POSITION STATUS MAINTENANCE (PSMT)

NOTES

REMOVING A HOLD

SCENARIO

July is here and the funds you needed to free up for your special project are no longer needed. Now, you need to fill the Computer Information Technologist Supervisor position.

In order to remove a hold from a position, information must be entered on the PSMT.

Step 1 Open the PSMT.

Step 2 Enter the required information in the following fields.

>   **AGENCY –** Type **650**.
>
>   **ORGANIZATION –** Type **4115**.
>
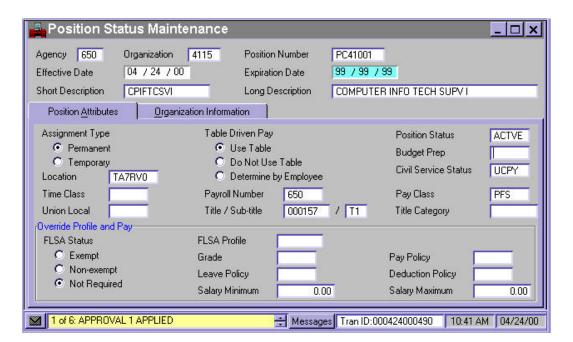>   **POSITION NUMBER** – **SEE STUDENT CARD**.
>
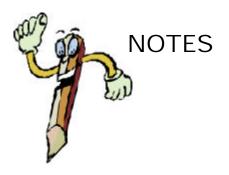>   Select **Display: Browse Data.**

Step 3 Enter the information you are changing on the PSMT window.

>   **EFFECTIVE DATE –** Type **TODAY'S DATE**.
>
>   **POSITION STATUS –** Type **ACTVE**.

POSITION STATUS MAINTENANCE (PSMT)

Position Status Maintenance

Agency	650	Organization	4115	Position Number	PC41001

Effective Date 04 / 24 / 00   Expiration Date 99 / 99 / 99

Short Description CPIFTCSVI   Long Description COMPUTER INFO TECH SUPV I

Position Attributes | Organization Information

Assignment Type
- (•) Permanent
- ( ) Temporary

Location TA7RV0

Time Class

Union Local

Override Profile and Pay

FLSA Status
- ( ) Exempt
- ( ) Non-exempt
- (•) Not Required

Table Driven Pay
- (•) Use Table
- ( ) Do Not Use Table
- ( ) Determine by Employee

Payroll Number 650

Title / Sub-title 000157 / T1

FLSA Profile

Grade

Leave Policy

Salary Minimum 0.00

Position Status ACTVE

Budget Prep

Civil Service Status UCPY

Pay Class PFS

Title Category

Pay Policy

Deduction Policy

Salary Maximum 0.00

1 of 6: APPROVAL 1 APPLIED   Messages   Tran ID:000424000490   10:41 AM   04/24/00

NOTES

REMOVING A HOLD APPROVAL PROCESS

Now, let's complete the approval processing of the PSMT.

Step 1   Select **Process: Update.**

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1. If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that approvals are ready to be applied.

Step 2   Close the transaction. Workflow will now route the transaction as needed.

Note: For training purposes, you will stop at this point. The instructor will complete the next step. However, in the "real world", you would perform one of the following step to apply additional levels of approval. Your ability to apply different levels of approval will be determined by your security profile.

Applying Additional but Not Final Approvals

Step 3   Select **Process: Approve.**

Step 4   Close the transaction. Workflow will now route the transaction as needed.
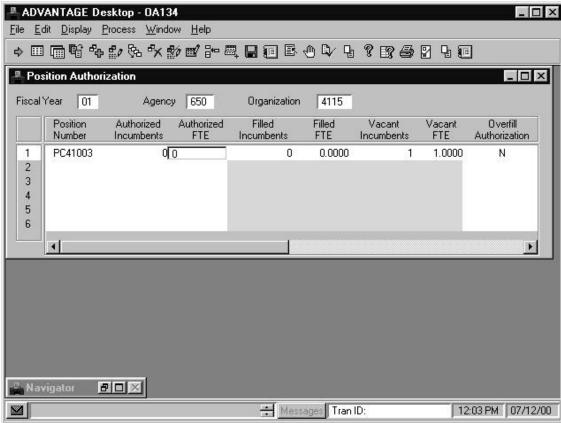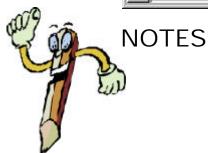
OR

Applying Final Approval

Step 3   Select **Process: Approve-Update.**

Step 4   Close the transaction.

POSITION AUTHORIZATION (PAMT)

NOTES

INACTIVATING A POSITION

SCENARIO

Well, time sure flies and it is now six months later. The Computer Information Technologist Supervisor position has been left vacant while your agency has been reviewing its overall human resource needs. Your agency decided that the position is no longer needed and you are requested to inactivate the position. Remember, inactivating a position not only means that it cannot be filled but that it will no longer be budgeted.

First let's access the PAMT to confirm that the position is vacant and delete the authorization to fill the position.

Step 1 Open the PAMT.

Step 2 Enter the required information in the following fields.

> **FISCAL YEAR –** Type **01**.
>
> **AGENCY –** Type **650**.
>
> **ORGANIZATION –** Type **4115**.
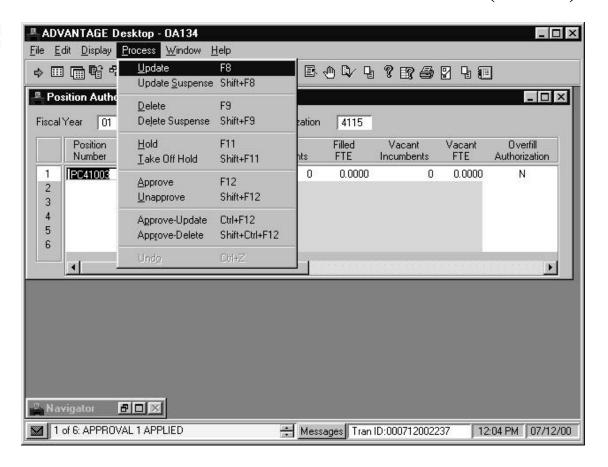>
> **POSITION NUMBER** – **SEE STUDENT CARD**.
>
> Select **Display: Get Specific Data.**

Step 3 Enter the information you are changing on the PAMT window.

> **AUTHORIZED INCUMBENTS –** Type **0**.
>
> **AUTHORIZED FTE –** Type **0**.

POSITION STATUS MAINTENANCE (PSMT)

NOTES

INACTIVATING A POSITION APPROVAL PROCESS

Now, let's complete the approval processing of the PAMT.

Step 1   Select **Process: Update.**

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1. If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that approvals are ready to be applied.

Step 2   Close the transaction. Workflow will now route the transaction as needed.

Note: For training purposes, you will stop at this point. The instructor will complete the next step. However, in the "real world", you would perform one of the following step to apply additional levels of approval. Your ability to apply different levels of approval will be determined by your security profile.

Applying Additional but Not Final Approvals

Step 3   Select **Process: Approve.**

Step 4   Close the transaction. Workflow will now route the transaction as needed.
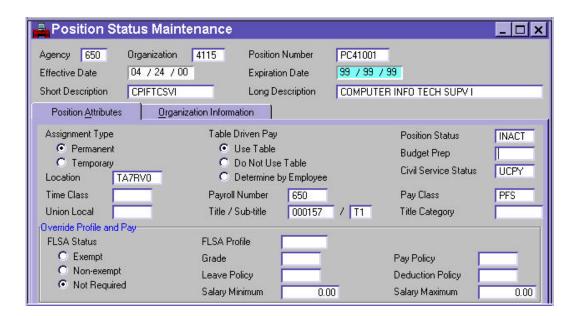
OR

Applying Final Approval

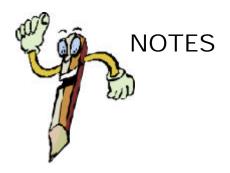**Step 3**   Select **Process: Approve-Update.**

Step 4   Close the transaction.

Now that you have deleted the position authorization, you need to change the position status on the PSMT.

POSITION STATUS MAINTENANCE (PSMT)

Position Status Maintenance

Agency 650 Organization 4115 Position Number PC41001
Effective Date 04 / 24 / 00 Expiration Date 99 / 99 / 99
Short Description CPIFTCSVI Long Description COMPUTER INFO TECH SUPV I

Position Attributes | Organization Information

Assignment Type
○ Permanent
○ Temporary
Location TA7RV0
Time Class
Union Local

Table Driven Pay
● Use Table
○ Do Not Use Table
○ Determine by Employee
Payroll Number 650
Title / Sub-title 000157 / T1

Position Status INACT
Budget Prep
Civil Service Status UCPY
Pay Class PFS
Title Category

Override Profile and Pay
FLSA Status
○ Exempt
○ Non-exempt
● Not Required

FLSA Profile
Grade
Leave Policy
Salary Minimum 0.00

Pay Policy
Deduction Policy
Salary Maximum 0.00

NOTES

INACTIVATING A POSITION

Step 1   Open the PSMT.

Step 2   Enter the required information in the following fields.

AGENCY – Type **650**.

ORGANIZATION – Type **4115**.

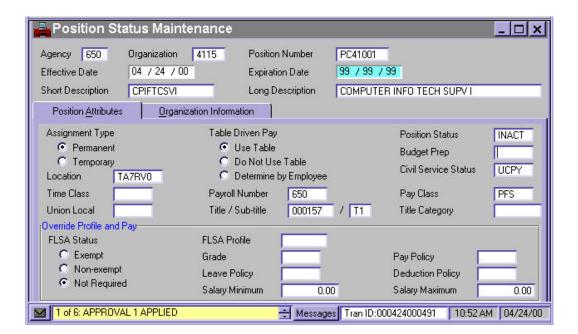**POSITION NUMBER** – **SEE STUDENT CARD**.
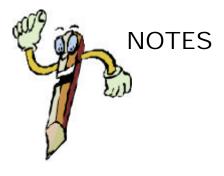
Select **Display: Browse Data.**

Step 3   Enter the information you are changing on the PSMT window.

EFFECTIVE DATE – Type **TODAY'S DATE**.

POSITION STATUS – Type **INACT**.

POSITION STATUS MAINTENANCE (PSMT)

NOTES

INACTIVATING A POSITION APPROVAL PROCESS

Now, let's complete the approval processing of the PSMT.

Step 1   Select **Process: Update.**

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1. If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that approvals are ready to be applied.

Step 2   Close the transaction. Workflow will now route the transaction as needed.

Note: For training purposes, you will stop at this point. The instructor will complete the next step. However, in the "real world", you would perform one of the following step to apply additional levels of approval. Your ability to apply different levels of approval will be determined by your security profile.

<u>**Applying Additional but Not Final Approvals**</u>

Step 3   Select **Process: Approve.**

Step 4   Close the transaction. Workflow will now route the transaction as needed.
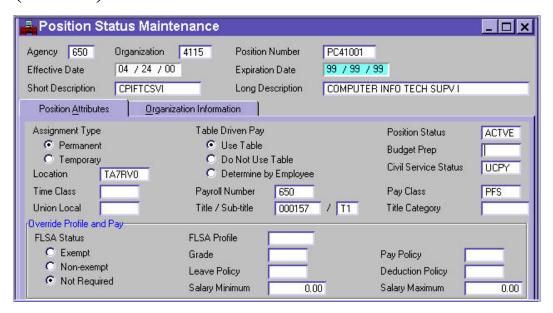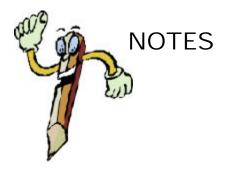
OR

<u>**Applying Final Approval**</u>

Step 3   Select **Process: Approve-Update.**

Step 4   Close the transaction.

To expire specialty codes that may be associated with the inactive position or other agency specific data, access the Position Control User Defined Window 2 (PUD2) or Position Control User Defined Windows 3 (PUD3), and enter specific information into required fields. You would make the necessary updates and complete the transaction approval process as you just did with the PAMT and PSMT. The necessity to change values on the PUD2 and PUD3 windows are defined by agency policies on the use of these windows.

POSITION STATUS MAINTENANCE (PSMT)

Position Status Maintenance

Agency	650	Organization	4115	Position Number	PC41001
Effective Date	04 / 24 / 00	Expiration Date	99 / 99 / 99
Short Description	CPIFTCSVI	Long Description	COMPUTER INFO TECH SUPV I

Position Attributes | Organization Information

Assignment Type
- ● Permanent
- ○ Temporary

Location TA7RV0
Time Class
Union Local

Table Driven Pay
- ● Use Table
- ○ Do Not Use Table
- ○ Determine by Employee

Payroll Number 650
Title / Sub-title 000157 / T1

Position Status ACTVE
Budget Prep
Civil Service Status UCPY
Pay Class PFS
Title Category

Override Profile and Pay

FLSA Status
- ○ Exempt
- ○ Non-exempt
- ● Not Required

FLSA Profile
Grade
Leave Policy
Salary Minimum 0.00

Pay Policy
Deduction Policy
Salary Maximum 0.00

NOTES

REACTIVATING A POSITION

SCENARIO

Due to an increasingly high demand for system changes, you need to hire a qualified person to supervise your IT shop. The Computer Information Technologist Supervisor position should be reactivated immediately.

In order to reactivate a position, information must first be entered on the PSMT.

Step 1 Open the PSMT.

Step 2 Enter the required information in the following fields.

> **AGENCY –** Type **650**.
>
> **ORGANIZATION –** Type **4115**.
>
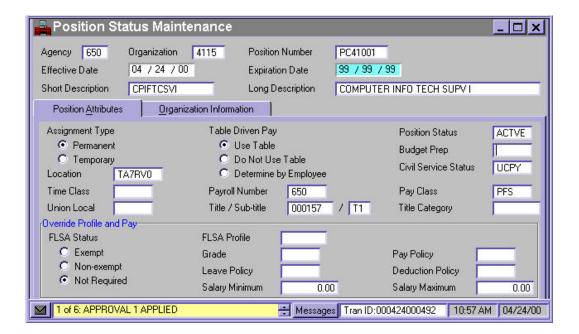> **POSITION NUMBER – SEE STUDENT CARD**.
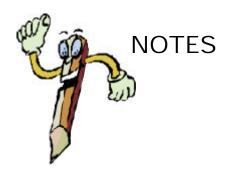>
> Select **Display: Browse Data.**

Step 3 Enter the information you are changing on the PSMT.

> **EFFECTIVE DATA –** Type **TODAY'S DATE**.
>
> **POSITION STATUS –** Type **ACTVE**.

POSITION STATUS MAINTENANCE (PSMT)

Position Status Maintenance				
Agency 650	Organization 4115		Position Number PC41001	
Effective Date 04 / 24 / 00			Expiration Date 99 / 99 / 99	
Short Description CPIFTCSVI			Long Description COMPUTER INFO TECH SUPV I	

Position Attributes | Organization Information

Assignment Type	Table Driven Pay	Position Status	ACTVE
● Permanent	● Use Table	Budget Prep	
○ Temporary	○ Do Not Use Table	Civil Service Status	UCPY
Location TA7RV0	○ Determine by Employee		
Time Class	Payroll Number 650	Pay Class	PFS
Union Local	Title / Sub-title 000157 / T1	Title Category	

Override Profile and Pay

FLSA Status	FLSA Profile			
○ Exempt	Grade		Pay Policy	
○ Non-exempt	Leave Policy		Deduction Policy	
● Not Required	Salary Minimum	0.00	Salary Maximum	0.00

1 of 6: APPROVAL 1 APPLIED | Messages | Tran ID:000424000492 | 10:57 AM | 04/24/00

NOTES

REACTIVATING A POSITION APPROVAL PROCESS

Now, let's complete the approval processing of the PSMT.

Step 1   Select **Process: Update.**

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1. If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that approvals are ready to be applied.

Step 2   Close the transaction. Workflow will now route the transaction as needed.

Note: For training purposes, you will stop at this point. The instructor will complete the next step. However, in the "real world", you would perform one of the following step to apply additional levels of approval. Your ability to apply different levels of approval will be determined by your security profile.

Applying Additional but Not Final Approvals

Step 3   Select **Process: Approve.**

Step 4   Close the transaction. Workflow will now route the transaction as needed.

OR

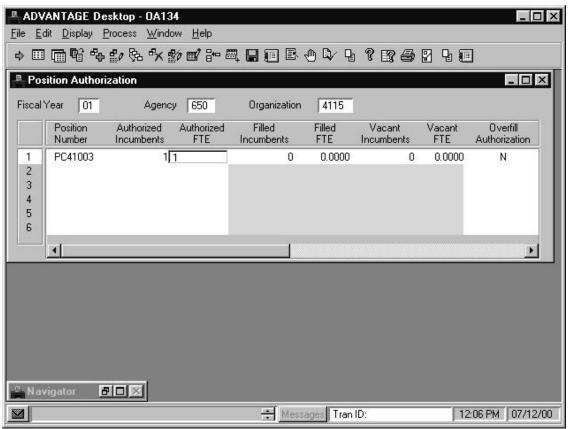**Applying Final Approval**

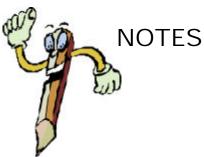**Step 3**   Select **Process: Approve-Update.**

Step 4   Close the transaction.

Now you need to complete the PAMT to authorize the position.

POSITION AUTHORIZATION (PAMT)

NOTES

REACTIVATING A POSITION

Step 1   Open the PAMT.

Step 2   Enter the required information in the following fields.

FISCAL YEAR – Type **01**.

AGENCY – Type **650**.

ORGANIZATION – Type **4115**.
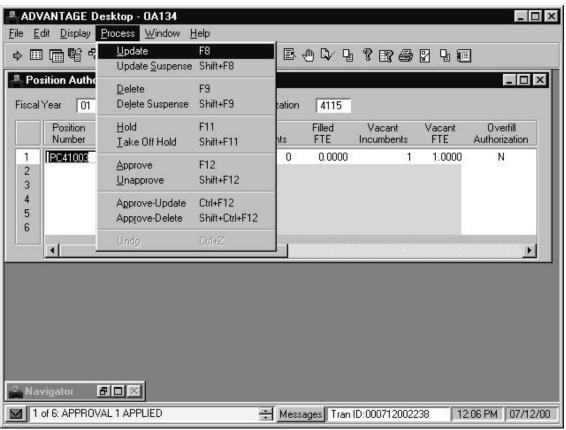
POSITION NUMBER – **SEE STUDENT CARD**.

Select **Display: Get Specific Data.**

Step 3   Enter the information you are changing on the PAMT window.

AUTHORIZED INCUMBENTS – Type **1**.

AUTHORIZED FTE – Type **1**.

POSITION AUTHORIZATION (PAMT)

NOTES

REACTIVATING A POSITION APPROVAL PROCESS

Now, let's complete the approval processing of the PAMT.

Step 1   Select **Process: Update.**

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1. If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that approvals are ready to be applied.

Step 2   Close the transaction. Workflow will now route the transaction as needed.

Note: For training purposes, you will stop at this point. The instructor will complete the next step. However, in the "real world", you would perform one of the following step to apply additional levels of approval. Your ability to apply different levels of approval will be determined by your security profile.

Applying Additional but Not Final Approvals

Step 3   Select **Process: Approve.**

Step 4   Close the transaction. Workflow will now route the transaction as needed.

OR

Applying Final Approval

Step 3   Select **Process: Approve-Update.**

Step 4   Close the transaction.

Remember, specialty codes that may be associated with the inactive position or other agency specific data may need to be updated. To do this, access the Position Control User Defined Window 2 (PUD2) or Position Control User Defined Windows 3 (PUD3), and enter specific information into required fields. You would make the necessary updates and complete the transaction approval process as you just did with the PAMT and PSMT. The necessity to update values on the PUD2 and PUD3 windows are defined by agency policies on the use of these windows.

ACTIVITY

- Your agency needs to hold a position for 6 months. After that time it is decided to inactivate this position. What steps would need to be taken to perform this task?

- Your agency is reallocating a position to a position that is multi-allocated. What field on the PSMT must be filled in to reflect this multi-allocation?

MAKE THE CHANGE

Change? Change is a way of life! Complete the following scenario and make the appropriate adjustments to the transactions in the system.

The Legal Defense funding ran out, therefore, the Assistant Public Defender position should be inactivated.

Hint: Make sure the position is vacant before you inactivate the position.

(PAMT)	Fiscal Year	01
	Agency	151
	Organization	2002
	Position Number	SEE STUDENT CARD
(PSMT)	Agency	151
	Organization	2002
	Position Number	SEE STUDENT CARD
	Effective Date	Today's Date
	Position Status	INACT